

PROPOSAL SUMMARY

52 Montebello Road is a stately building that stands proud above Montebello Street. Abandoned and boarded up, it along with 50 Montebello detracts from the character, energy and safety of the neighborhood.

I Development Concept

The simple development objective for the revitalization is as follows:

1. Contribute to Neighborhood Sustainability through renovation and reconnection to the street;
2. Contribute to Environmental Sustainability via a Low Impact Development site plan;
3. Contribute to Owner's Economic Sustainability by replacing key building systems and delivering a building that is it at the beginning of its useful life - reducing both common association charges as well as minimizing energy costs;
4. Create a Sustainable Owner's Association via a well constructed building, minimal common area expenses, low maintenance landscape and building materials, and extended training to ensure that a collection of very busy new home owners can become an organized and functional owners association.

Realizing the Objective

Site Design:

50-52 Montebello is a very challenging site. 52 Montebello sits approximately 12 feet above Montebello Road and is accessed by a steep set of existing stairs. The useable front yard area is very limited given the extreme slope from building to street that makes up the front yard. 50 Montebello consists of a series of rock outcroppings (Roxbury Pudding Stone) and literally serves as the physical transition from the Walnut/Sigourney neighborhood to the Washington Street commercial corridor.

Goals of the site design are as follows:

1. 50 Montebello is to be designed to communicate a sense of safety via a strong separation between sidewalk and lot while ensuring that the base of the hill does not become a collector of trash and debris.
2. 50 Montebello is to be designed to accept and facilitate the development planned to occur on adjacent parcels of land without impacting the objectives of the landscape design.
3. 52 Montebello is to provide a vibrant connection between the sidewalk and retaining wall reinforcing the unique character of the neighborhood.

4. 52 Montebello is to be designed to minimize the cost and obligation of daily/weekly landscape maintenance. NO weekly maintenance is required at the front and northwest side of the building.
5. 52 Montebello should utilize the reconstruction of the front porch to create a small gathering space on the southwest/street side of the building while also creating a small and clearly delineated gathering space in the rear of the building.
6. Storm water is to be managed on site and used as the sole source of irrigation for drought resistant plantings.

Oxbow has retain Kate Kennan of Offshoots, Inc. as site/landscape design build contractor. Offshoots is a small women owned business enterprise located in Boston. Offshoots has distinguished itself with its understanding of how vegetation can be used to manage the challenges of urban development with a specific specialty in phyto-remediation. In addition, Kate is quite familiar with Jamaica Plain having completed several projects in the neighborhood and with several high profile designs in waiting.

When referencing the site design/landscape plan L-1, please note the following:

- A. An easement area has been identified that will be established prior to the creation of the Association which will allow for necessary activities to support surrounding development.
- B. A new 4' fence will be installed between the sidewalk and 50 Montebello behind which the lower portion of the lot will be planted with ferns, wildflowers and pennsylvania shad. The introduction of these drought resistant shade plantings will enliven the streetscape and discourage people from throwing trash into this unoccupied area.
- C. At the front of 52 Montebello, a new protective fence will be installed but it will be set back 3 feet from the current retaining wall. This will allow for flowering bushes and annuals to be planted which will thrive in this sunny area and bring color to the street. This area will also be graded to ensure that rainwater running down the hill will be collected to naturally irrigate the plantings while also limiting spillage onto the sidewalk. This is particularly important in the winter months to reduce ice patches given the extent of the slope on Montebello Road.
- D. In many ways, the central element of the site design is the replacement of traditional grass with pennsylvania shad on all portions of the lot that are not walkways, sitting areas or the rain garden. When established, the shad will provide a dense covering while eliminating the need for mowing. The extent of the shad planting will also stabilize the slope thus minimizing erosion while also deterring people from walking or storing items in this area.

- E. The front porch will be open to the street and a new connection to the stairs will be built utilizing pervious paving materials. This will be a popular gathering spot given the exposure to the sun and new flowering trees one on each side of the porch.

- F. The rear yard, the most level and private area of the lot, suffers from the fact that it is generally blocked by the sun from 52 Montebello building. An outdoor seating area will be created that can be accessed directly via the stairs from Montebello Road or from the units via the rear stairway. This will allow for small group gatherings. An edible herb garden will be created to from smell, color and potential use.

- G. The second key element in the design is the combination of bio-swale which takes rainwater from the rear yard and diverts it to the large rain garden that will be located on the northwest side of the building. The rain garden will ensure that storm water from both the roof and the yard will be collected and managed prior to reaching the steep grades of 50 Montebello.

In total, the landscape solution represents Low Impact Development at it's best - embracing the character of the land while accentuating the natural systems. Aesthetically, the design also reinforcing vitality at the street and providing multiple gathering areas so that owners can enjoy the privacy of their location high above the street. And best of all for the owners, once established the landscaping system will require only spring and fall maintenance.

Realizing the Objective

Rehabilitation of 52 Montebello:

From our experience, we have learned that the sale of deed restricted homes requires much more effort than just “building it and they will come”. The homes must include the desired amenities and meet the expectations of the buyer. Key selling points of 52 Montebello will include:

1. Acknowledgement that “Community is Great” but Privacy is Better. When designing multi-family homes within a shared structure, it is critical that people feel a sense of privacy when entering their homes. Community (and owners associations) work when people are able to engage their neighbors on their own terms. Privacy within 52 Montebello is enhanced by several design decisions:

- Selectively removing one wall to open up the living space from front to back allows the kitchen to be placed in the middle of an open space. This provides two separate living spaces (one at the front of the building and one at the rear of the building) whose function can be determined by the buyers.
- The structural condition of the rear stairs requires that they be rebuilt. In the reconstruction, as opposed to one single porch area, we will create two separate areas which can be directly accessed from each unit. A private patio which does not involve shared access and shared storage of patio furniture is very desirable. In addition to a great outdoor space, this solution ensures that “common space” is minimized and thus the responsibility of a single owner.
- Providing stackable washer/dryer’s within each unit. This and a dishwasher are very desirable to first time home buyers.

2. Providing Value through High Quality Materials and Energy Efficient Systems. Buyers are appropriately wary of ‘rehabilitations’ where they do not have a sense of the underlying conditions in the home they are buying. A highly valued amenity to Buyers (and to the stability of the owners association over time) is the presence of new building systems and an energy efficient design which minimizes utility bills. Having had limited access to the building, it has been difficult to thoroughly scope the existing systems. The proposal assumes the following:

- The **existing skin** of the building (wood shingles/aluminum siding and windows) will be removed. This will allow us to install a fully functioning exterior wall with appropriate water/moisture barrier, rigid insulation to greatly increase the R value, and new energy efficient windows. The exterior will be finished with hardiplank/cementitious siding and composite/azak trim. The end result will be significant: elimination of potential moisture/mold issues, an excellent thermal envelope and a top of the line aesthetic finish with detailing which will be very similar in nature to 53 Montebello which is across the street.

- Given that the building is an 'existing non-conforming use', we have anticipated that the fire department will require the installation of a **fully compliant 13R sprinkler and fire alarm** system. This will require the installation of a new water line from the street into the building. This is a costly upgrade but one that we anticipate will be required.

- The relocation of the kitchen along with the proposed installation of a stackable washer and dryer in the current pantry space will afford the opportunity to provide **new water/vent lines** in the building. The existing condition of the cast iron piping in the existing kitchen walls appeared to be very poor and a certain liability if reused.

3. **Storage Storage Storage.** Storage is always at a premium and smart solutions are very valuable in urban settings. The ability to safely store bikes, canoes, seasonal decorations, etc. in a private and secure location is rare. 52 Montebello has a full sized basement with an adequate ceiling height to allow for a secured storage solution for each Owner.

- The **initial goal was to replace** the existing hot water/radiator hydronic heating system with a split system which would provide heating, air conditioning and moisture control. The current proposal does not include this change given the conceptual cost associated with the system change. With better access to the building we will be able to analyze the existing condition of the hot water boilers/ distribution system and make a determination on the condition of the existing system as well as the cost to switch to a split system with in unit / on-demand water heater. The newly insulated exterior skin will significantly reduce the heating requirements making the re-use of the existing system a viable solution.

4. **An Educated and Functioning Owners Association.** Based on our past experiences, many developers are quick to move on to their next project and do not emphasize the training and launch of the newly formed owners association. This is even more critical in a small building that cannot support the cost of a professional management company.

Oxbow's commitment to the long term success of a building begins day one as we work to find sensible solutions to creating high quality housing, to ensure that the transition to ownership is as smooth as possible, to support the new residents during Year 1 and to identify local resources that will be available to the community over time. Key steps involve:

- Educating Buyers about the Mechanics of their new Home. This is best done via a dependable turnover process, technical sessions with buyers and subcontractors present, the creation of a useable/electronic homeowners manual and the creation of simple System Training Videos on YouTube. The following links will take you to examples of such videos used in the past:

<https://youtu.be/AOyrIz-KtU> Photovoltaic System

<https://youtu.be/K5Q70g4J3aU> Fire Protection System

<https://youtu.be/rdi79Hkl1qU> Heating/Cooling

<https://youtu.be/GYm8ddYy6pI> Plumbing

<https://youtu.be/UGSQcmj56ww> Electrical System

- Assistance in the Transition to Self Management. As stated above, the reality is that the 6 owners of 52 Montebello will not be able to afford a private management company and will need to self manage. We are sensitive to how disruptive it is to move let alone having to move and then immediately make sure that the water and sewer bills are being paid. The following are tools that help ensure a sane and smooth transition to self management:

- Professional Guidance: The budget includes an allowance for Financial Education Associates/Jacqueline Cooper to participate in 3 initial training sessions as well as attend quarterly association meetings for year 1. This will include ensuring that the association is able to establish contracts with the appropriate resources that may be needed (accounting/tax).

- Linking Association to Local Expertise: JP is unique in that there are very well established housing support organizations. Part of the transition effort will be to ensure that introductions and adequate communication exist between these community based groups and the new Owners at 52 Montebello.

Scope of Work:

We have included the detailed conceptual estimates from both Offshoots, Inc. and Stack +Co. as the best representation of the scope upon which the Proposal is based. Note that this detail is separate from the One Stop Section 3 - Construction Budget which represents the basis for the proposal.

Development Budget:

Please reference the attached One Stop Section 3 which includes both the total development budget and the construction budget.

** Please note that due to the limited access to the building, the construction estimates are extremely conceptual. We anticipate/are hopeful that as scope is refined and competitive estimates are obtained, the construction number will be refined/reduced.

Financing Letter of Interest:

Attached please find letters of interest from both **Boston Community Loan Fund and Eastern Bank**. Oxbow has excellent relationships with both lenders and both are currently involved in the Sachem's Path HomeOwnership development. In addition, staff from Eastern have financed both The Residences at 89 Oxbow in Wayland and the Residences at 33Comm in Newton.

Predevelopment Budget:

Below is the anticipated Pre-Development budget to take 50-52 Montebello to construction loan closing:

Architect:	\$ 30,000
MEP:	\$ 7,500
Civil:	\$ 5,000
Landscape:	\$ 7,500
Environmental:	\$ 10,500
Permits/Fees:	\$ 3,000
Finance Fees:	\$ 12,000
Legal:	\$ 12,500
<u>Contingency:</u>	<u>\$ 10,000</u>
TOTAL PD:	\$ 98,000

Green Building Elements:

Please reference the attached LEED for Homes checklist for a detailed description of the Green Building Elements. An overview of the elements are as follows:

- Low Impact Site Development (cutting edge tools with potential replication)
- Air Tight High Performance building envelope
- Use of Bio Swales and Rain Gardens for Storm Water Management
- Use of Drought Resistant / Low Maintenance Plantings
- Pervious Surface Area less than 5% of total project site.
- Material Choices made with Indoor Air Quality in Mind
 - no carpet / active fresh air recirculation / improved moisture barrier at building skin
- Use of high efficiency appliances, LED light fixtures, mechanical equipment
- Selection of durable materials/products to minimize maintenance costs